



Assigning Jobs to Supervisory and Managerial Occupations

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Deciding if a position belongs in a supervisory class or not means considering both the more typical supervisory tasks, such as performance evaluation or discipline, and management tasks, such as resolving work unit problems having to do with things like equipment performance, output quality, and work schedules. Job descriptions or profiles frequently list these areas under separate headings with separate percentages that need to be combined to determine if a job falls into a managerial or supervisor occupation.

The Standard Occupational Classification (SOC) has one major group related to managerial occupations. The following major groups have first line manager and supervisors as minor occupational groups: 33, 35, 37, 39, 41, 43, 45, 47, 49, 51, and 53. The State of Montana classification system has added first line supervisors and managers to the remaining groups.

SOC major group 11, Managerial Occupations includes top executives and managers. Job codes for these occupations begin with "11" and job titles include the word "Manager." Use one of these job codes and titles only if the work is at least 80% managerial and the position is a bureau chief or higher.

The other major groups include either Montana specific titles for first line managers and supervisors (groups 13-29) or SOC minor occupations for first-line managers or supervisors (groups 33-53). Use one of these job codes and titles if the work is at least 50% supervision and first-line management and the subordinate positions are in the same occupational group.

The attached decision tree leads you through the steps you need to consider in classifying supervisory and managerial jobs. It uses the following definitions:

Lead worker

- Perform work of the same or comparable nature or difficulty as the employee supervised.
- Report to a higher level supervisor on the performance of individual workers as part of the formal performance appraisal process.
- Review the work of subordinates.

Relays work assignments received from a higher level supervisor and performs work of the same or comparable nature and difficulty as their subordinates; assigns tasks, establishes the work pace; demonstrates proper work methods; assures that appropriate tools, supplies, materials, and other equipment are available; assures that work is equitably distributed; ensures housekeeping and

safety procedures are followed; resolves problems of detail; reviews work products for accuracy, adequacy, and timeliness; reports to higher level supervisor on need for additional on-the-job training for individual workers, on status of work, cause of delays, need for changes, and on performance of individual workers. Generally, a lead worker works the same hours or shift as the direct subordinates.

Lead workers are always allocated to the same occupation as their subordinates and are frequently at the same level.

Supervisor

- Determine the performance appraisal criteria based on assigned duties of subordinate positions.
- Evaluate and deliver performance appraisal to subordinate employees.

Using independent judgment in the interest of management: recommends hiring, discharge and promotion of subordinates; interprets, monitors and implements work plans, policies and procedures; reviews work for compliance to quantity, quality and budgetary standards; evaluates training needs, proposes training programs, and evaluates training effectiveness; determines work standards and time lines; conducts formal and informal performance evaluations, implements corrective action, provides discipline; approves leave, travel vouchers and work schedules; resolves technical and administrative problems having to do with detail or procedure; coordinates the work with other units or programs.

These positions are predominantly responsible for the day-to-day performance of subordinates and for the accomplishment of specific tasks or pieces of work. They monitor daily performance for adherence to standards set by a manager and may discipline or work with a manager to discipline employees. Such positions are typically concerned with work activities (assigning work, implementing and explaining methods, training) and short-term objectives. Positions will be allocated to the occupationally appropriate first-line supervisor/manager class if supervision is over 50% of the job. If supervision is less than 50% of the job these positions should be classified in the same occupation as their subordinates. Typically section supervisors or the chiefs of smaller, single function bureaus will meet these requirements.

Supervisor Manager (Working Manager)

- Responsible for the allocation of financial and human resources to accomplish an assigned body of work; including assigned authority for

planning the overall work operation and adjustment of the subordinate organizational structure as necessary.

- Managerial diversity is limited. Occupations/activities of direct service providers (subordinates) are all related as identified through class series assignment. Subordinates supervised reflect related occupations and interrelated activities. (Use an organization chart!)

This level describes an individual having responsibility to use independent judgment in the interest of the employer to direct the work of an organization by determining the need for organizational changes that have considerable impact. These can include organizational structure, costs and personnel, setting program policy and means of operation and coordinating with other internal efforts and external organizations. Managers are held accountable for the success of programs in meeting goals and objectives.

If the combination of supervision and management totals at least 50% of the job, the position is classified as a first-line manager or supervisor. If it does not, the position should be placed in the same occupation as the highest paid subordinates.

Manager

- Managerial duties constitute 50% to 80% of the work.
- Subordinates represent significant diversity of occupations or activities through class series assignment or assigned duties. Occupational titles or class series may be identical even though activities are diverse. Subordinates in the same or similar class series may be involved in diverse activities such that the manager oversees distinctly different programs or activities. May manage through subordinate supervisors.

These positions are responsible for a function, program or sub-program of the organization and are concerned with overall program performance and longer-term objectives. Responsibilities include planning, selecting, and devising methods or procedures to achieve assigned goals. They supervise overall staff activities by monitoring output (both quantity and quality) in order to determine if changes in processes or priorities are needed and are responsible for operation, priorities, setting deadlines and manipulating organizational structure in order to facilitate achieving organizational goals. Such positions report to a supervisor, set performance standards and do not necessarily monitor day-to-day performance of subordinates. Positions that manage 80% or more of the time will be allocated to the managerial class in group 11 that is closest to the occupation of the highest level subordinates. If management is between 50% and 80% of the time, the position will be allocated to the occupational "first line supervisor/manager" class.

Executive

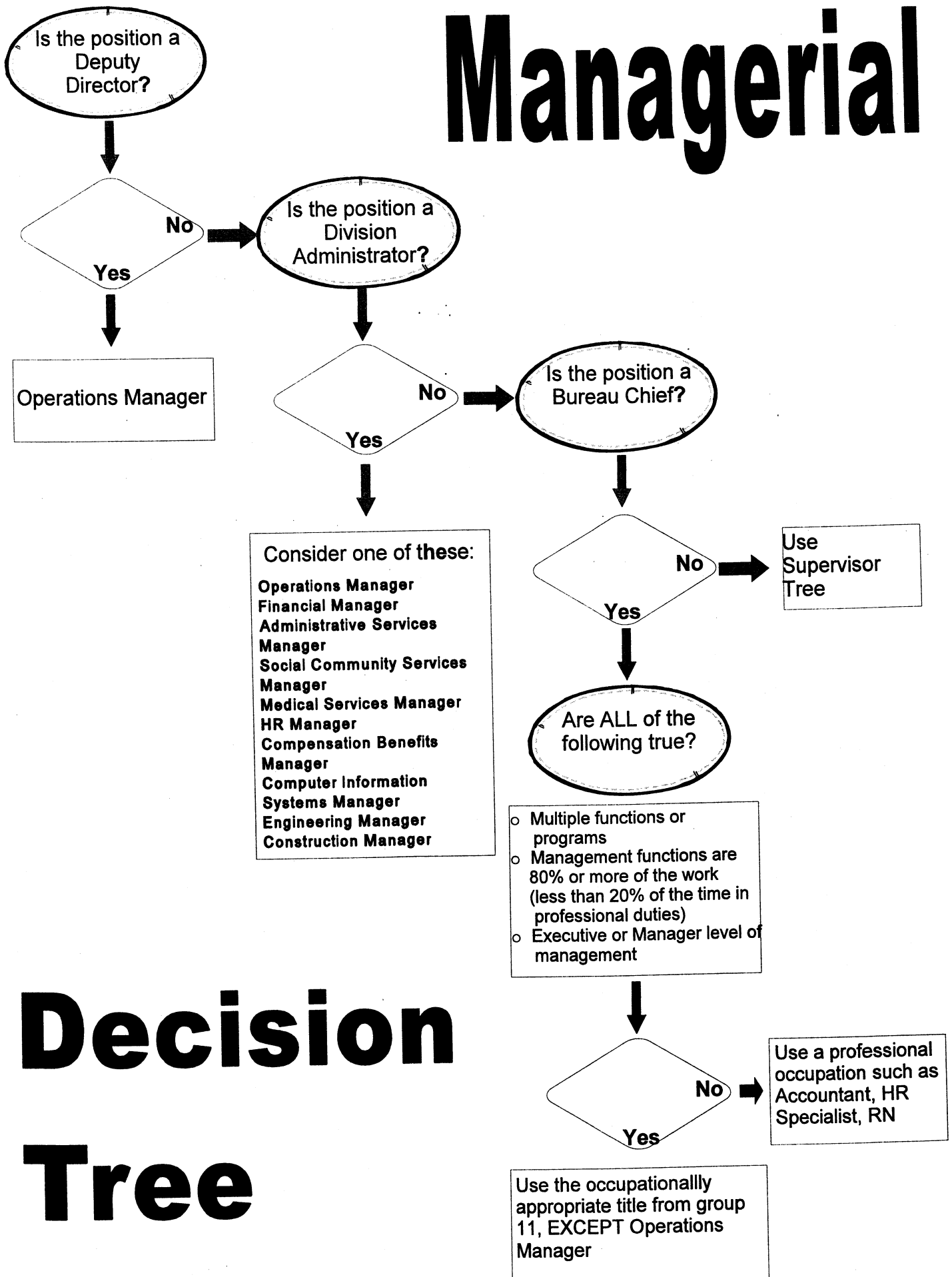
- Manages through subordinate supervisors or managers that oversee diverse activities of multiple work units.
- Responsibility for integrating the work of multiple work units for the purpose of coordinating agency goals and objectives. Integration is necessary at this level because the breadth of diversity found in subordinate work units is such that integration into the unit goals would not necessarily occur without considerable effort by management.

These positions secure and allocate human, financial and other resources to accomplish the agency mission, establish organizational standards as the basis for performance management, and are concerned with organizational performance and the “big picture”. Responsibilities include establishing operating goals, directing the overall work of the organization toward these goals, and monitoring results in order to plan the nature, content and extent of operations, organizational structure, and budgets. Frequently these positions are classified as Operations Managers. A position that is the highest level of financial authority in an organization AND manages a financial unit, such as a Financial Operations Division, should be allocated to Financial Manager. Positions that are not executive level positions should not be allocated to either of these occupations.

Points to Consider when selecting a managerial title or occupational group:

- *Select the more specific occupation based on the function or function of a Division. Ex.: Financial Manager for a Financial Services Division instead of Operations Manager.*
- *Select the occupational title that reflects the work done in a bureau. If the bureau is responsible for programs that are not captured by one of the occupational titles use Program Manager (Regulatory Program Manager if the programs involve compliance with regulations).*
- *Chiefs of very large bureaus with multiple sections that are each responsible for multiple functions may be described as Operations Managers. This does not happen often and only in very large agencies. In smaller agencies these positions would be division administrators*
- *Bureau chiefs that are working managers should be allocated to the occupation they in which they work. This will be true of chiefs of small bureaus with limited or no staff.*
- *Lead workers and most line supervisors will not fall into Managerial Occupations.*
- *Supervisors of very large sections with multiple functions may be allocated to a managerial occupation. This does not happen often and only in very large agencies. This type of position would be a bureau chief in a smaller agency. In such a case select the occupational title that reflects the work done in the section. If the section is responsible for a program that is not captured by one of the occupational titles use Program Manager*
- *Supervisors that are first line supervisors and managers of a function should be allocated to the occupation they in which they work. Only use the first line supervisory title if supervision and management are more that 50% of the total work.*

Managerial



Decision Tree

Supervisor

Decision

Tree

